



coraggiogroup

Strategic Planning Project

Mendocino County Tourism Commission

April 3, 2023

Submitted by Coraggio Group

2240 N. Interstate Avenue, Suite 300

Portland, OR 97227

503.493.1452

coraggiogroup.com



April 3, 2023



Travis Scott
Executive Director
Mendocino County Tourism Commission
P.O. Box 89
Ukiah, CA 95482

Hello, Travis and Members of the Selection Committee,

On behalf of our team, I am pleased to share our proposal for your Strategic Planning project for Mendocino County Tourism Commission.

Since 2005, our consultants have been helping tourism leaders and their organizations nationwide envision their destination's future, create compelling plans, and foster the agile teams necessary to lead the way for their residents and stakeholders. We offer the depth and breadth of experience to help clients better understand their rapidly changing operating environments, determine how to respond to complex challenges, and position their destinations to seize the right opportunities.

We're frequently asked, "Why did you name your firm Coraggio?" It's a great question and one we enjoy answering. Coraggio is the Italian word for courage. It serves as a daily reminder of the first commitment we make to every client: to have the courage to challenge them to reach beyond what might be comfortable or easy so they can reach their full potential. "Coraggio" is the first of the four consulting principles that unite our team in how we approach our work: **Courage, Truth, Grace and Humility.**

Since our founding, we've placed these ideals at the center of our work. They represent the foundation of the experience our clients have with their Coraggio project teams and are why, over the years, so many of our clients have chosen our firm over and again to help them take their next big leap forward.

Based on the needs you outlined in your RFP, I believe our firm is ideally suited for this important project, particularly given our experience and familiarity with your organization and destination during your last strategic planning cycle. It would be a pleasure to work with your organization once again.

Thank you for considering our firm for this significant undertaking.

Enthusiastically,

A handwritten signature in blue ink, appearing to read 'Trever Cartwright', written in a cursive style.

Trever Cartwright
Founder and Principal
Coraggio Group



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Company Background

Per RFP: Provide a short company background.

About Coraggio

Our Travel & Tourism Practice—We’re excited about where we’re going, but we’ll never forget where we came from.

Our travel & tourism journey started in 2006 with a phone call to Travel Oregon CEO Todd Davidson. At this early point in the evolution of our firm, he had never heard of Coraggio, but after a few conversations, he decided to take a chance. *He would later tell us that it was the idea of Coraggio that caught his attention and that hiring us was “an act of courage!”*

After completing our first project with Travel Oregon, Todd introduced us to Joe D’Alessandro, who, at the time, was the CEO of the Portland Oregon Visitors Association (now Travel Portland). After helping Joe on a few assignments at POVA, he was recruited to San Francisco as the President and CEO of the San Francisco Convention & Visitors Bureau.

These first projects with Todd and Joe so many years ago set the stage for what has now become a respected national travel & tourism practice, an accomplishment we’re very proud of and humbled by. Since then, we’ve led strategy projects for 25 state tourism offices and dozens of CVBs across the country, including dozens for California destinations in 11 of its 12 tourism regions. Additionally, we’ve had the opportunity to lead Brand USA’s most recent strategic planning work and to help U.S. Travel begin its workforce development initiative.

Our destination strategists, each of whom has received their professional certificate in Sustainable Tourism from the Global Sustainable Tourism Council, have been featured speakers at Governor’s Conferences on Tourism in several states and, when the COVID-19 pandemic hit in March of 2020, our entire travel & tourism team worked from their homes to develop and launch an online Destination Recovery Toolkit that destination leaders could access at no charge.

Affiliations and Peer Recognition

Coraggio is part of a growing movement of businesses nationwide that believe and practice the Triple P bottom line of **People, Planet and Profit**. We take pride in having met the Benefit Corporations for Good certification standards each year since 2018, and we are committed to continuing our efforts to create better communities, a better planet, and a better business.

Coraggio is certified by the City of Portland as a Sustainability at Work company. We utilize many strategies to ensure the impacts of our business are positive, from recycling to community giving. One way we reduce our carbon footprint is by offering clients hybrid or fully virtual facilitated meeting structures. Should clients prefer in-person facilitations, we are happy to accommodate them. For this proposal, our fee estimate assumes in-person facilitation.

Most recently, we were honored to be recognized by our peers statewide as one of Oregon’s top 10 Most Admired Companies for 2022 in the business consulting category.



Main Point of Contact

Per RFP: Who will serve as the Mendocino County Tourism Commission’s main point of contact.

MCTC’s point of contact for this proposal and contract will be:

Trever Cartwright

Founder and Principal

Coraggio Group LLC
2240 N. Interstate Avenue, Suite 300
Portland, OR 97227

Office: 503.493.1452

Mobile: 503.939.7545

Email: trever@coraggiogroup.com

Planning, Execution, and Delivery Process

Per RFP: Outline of your company’s planning, execution, and delivery process.

Coraggio uses an inclusive approach to planning that emphasizes engagement. In addition to ongoing project management activities, status updates, and communication, we envision facilitating active planning and decision-making sessions with Visit Mendocino County. These sessions are designed to shape the county’s view of plan development and prepare for the final presentation and delivery of the plan with the Visit Mendocino County team.

Certainly, many moving parts need to come together to place (and keep) the project on its proper track once work begins. Once we can begin collaborations with Visit Mendocino County, hear more about your needs and expectations, and dive more deeply into the dynamics surrounding this work, we will better understand how to flex our recommended approaches. Our past work with you should make this process move very smoothly.

Over the years, we’ve discovered something essential about helping leaders and their organizations do big things:

To get to the bottom line, you have to go through the front line.

It sounds obvious, but why do so few consultants practice this way? We work with our clients to support and develop their team while executing a rigorous and effective process. Balance is the key, and doing both simultaneously brings greater and more reliable results than doing them separately.



Areas of Experience

Per RFP: Rate your company's experience and effectiveness in the following areas. You may include an explanation.

We are experts in the following areas, as demonstrated through our work and partnerships as detailed below.



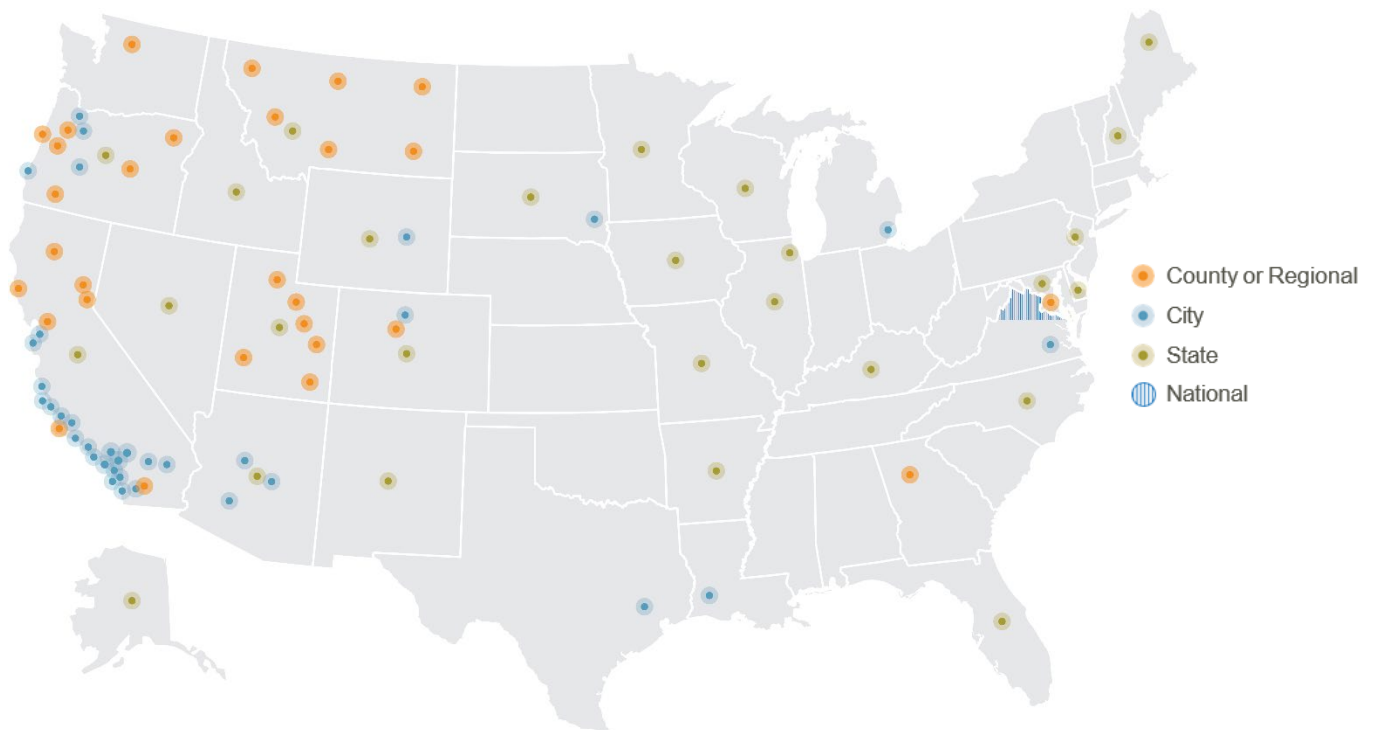
| Areas of Experience | Rating (1-5: 1=no experience, 5=expert) |
|--|--|
| <p>Strategic Partnerships</p> <p>We have completed 350+ strategic plans for a variety of clients, primarily for destination organizations across the country. More than two-thirds of the work we do is related to strategic planning.</p> | 5 |
| <p>Destination Marketing Partnerships</p> <p>We have presented at the biggest annual conference for destination marketing in the U.S. – Educational Seminar for Tourism Organizations. Additionally, U.S. Travel has hired us for the past seven years to design and lead their annual leadership forum for the National Council of State Tourism Directors. Also, as members of the Global Sustainable Tourism Council, we are committed to increasing sustainable tourism knowledge as part of our work with clients.</p> | 5 |
| <p>Contracted by Numerous Destination Organizations</p> <p>See pages 8 and 9 for a list of Destination Organizations we've served.</p> | 5 |
| <p>Collaboration With Destination Industry Partners</p> <p>We've had the opportunity to lead Brand USA's most recent strategic planning work and to help U.S. Travel begin its workforce development initiative. Our destination strategists have also been featured speakers at Governor's Conferences on Tourism in several states.</p> <p>Our partners also include CalTravel, Visit California, and Global Sustainable Tourism Council, and we collaborate with many other industry service providers when needed.</p> <p>Coraggio was acquired by Miles Partnership in 2021. While neither our name nor the principles upon which we base our consulting practices have changed, the scope of our capabilities has. Our connection to Miles positively impacts our capacity to deliver nationwide. Miles Partnership is a strategic marketing consultancy focused exclusively on travel and tourism, with 68 years of marketing experience fueling their work with more than 130 tourism partners worldwide.</p> | 5 |

Coraggio has been an invaluable partner to CalTravel and to me personally as the facilitators and key architects of our strategic planning process for more than five years. They do an excellent job of challenging assumptions, building consensus, and helping shape clear strategies with measurable goals. Their firm is highly respected in our industry, creative, and delivers an engaging approach. I am happy to give Coraggio my highest recommendation.”

— Barb Newton, President & CEO, CalTravel

Coraggio is the only firm in the U.S. with our powerful combination of strategy expertise, organizational effectiveness, and destination marketing experience at every scale within the travel and tourism sector. A few examples are below.

- U.S. Travel has hired us for the past seven years to design and lead their annual leadership forum for state tourism directors (National Council of State Tourism Directors). These forums emphasize practical ways to strengthen leadership and organizational effectiveness.
- We are proud members of the Global Sustainable Tourism Council (GSTC). We're committed to increasing sustainable tourism knowledge and practices among public and private stakeholders and promoting the adoption of universal sustainable tourism principles. *Each of our destination strategists is a GSTC-trained practitioner.*
- We have been or will be featured speakers at the state tourism conferences of Arizona, Arkansas, Delaware, Florida, Idaho, Iowa, Maine, Missouri, New Hampshire, North Carolina, Oregon, South Dakota, Utah and West Virginia, sharing insights and best practices on organizational effectiveness, leadership, resilience, stewardship and strategy.
- On the national stage, we have presented at Destination International's Annual Conference and their Advocacy Summit. We also presented a webinar as part of U.S. Travel's online replacement for their ESTO (Educational Seminar for Tourism Organizations) conference—one of the biggest annual conferences for destination marketing in the U.S. Also, this year we will facilitate the fourth WESTO conference that brings together leaders from most of the 15 states that comprise the Western States Tourism Policy Council.
- We have worked directly with the leadership teams and industry stakeholders of 25 state tourism offices and with dozens of city and county tourism agencies nationally, both urban and rural, including 35 destinations in California.
- In addition to travel & tourism industry expertise, our team members have marketing, economic development and urban planning backgrounds, helping us bring in-depth knowledge and expertise to our strategic planning and tourism master planning projects.



Coraggio's client and project footprint



Travel & Tourism Clients

- Arizona Office of Tourism
- Arroyo Grande Tourism
- Beverly Hills CVB
- Brand USA
- California Travel Association
- City of Avondale
- City of Atascadero
- City of Oregon City
- City of Seaside
- Colorado Tourism Office
- Delaware Tourism Office
- Enjoy Illinois
- Explore Minnesota
- Greater Houston CVB
- Greater Ontario CVB
- Greater Palm Springs CVB
- Idaho Tourism
- Illinois Office of Tourism
- Iowa Tourism Office
- Kentucky Department of Tourism
- Los Angeles Tourism and Convention Board
- Marina del Rey CVB
- Maryland Office of Tourism Development
- Missouri Division of Tourism
- NBC Universal
- Nevada Division of Tourism
- Nevada Tourism & Cultural Affairs
- New Mexico Tourism Department
- San Diego Convention Center
- San Diego Hotel Motel Association
- San Diego Tourism Authority
- San Luis Obispo CVB
- Santa Maria Tourism
- Santa Monica Travel & Tourism
- San Francisco Travel
- Sioux Falls CVB
- Snohomish County
- Sonoma County Tourism
- South Dakota Department of Tourism
- Travel Alaska
- Travel Oregon
- Travel Paso
- Travel Portland
- Travel South
- Travel Southern Oregon
- Travel Wisconsin
- Unincorporated SLO County TBID
- US Travel Association
- Utah Office of Tourism
- Visit California
- Visit Casper
- Visit Corvallis
- Visit Detroit CVB
- Visit Florida
- Visit Huntington Beach
- Visit Lake Charles
- Visit Mendocino County
- Visit New Hampshire
- Visit North Carolina
- Visit Placer County
- Visit Santa Barbara
- Visit SLO CAL
- West Hollywood Travel + Tourism Board
- Visit Williamsburg
- Washington County Visitors Association
- Wyoming Office of Tourism

Destination Organization Experience

Helping our tourism clients take big leaps forward is what we do best. Below are a few destinations we've had the pleasure of supporting.





Experience Leading Virtual and In-Person Strategic Planning Processes

We have extensive experience facilitating meetings and building consensus among individuals with diverse and differing viewpoints.

Strategic Planning Methodology

Per RFP: Outline of your company's strategic planning methodology and think tank process.

More than two-thirds of the work we do is strategic planning related. We have completed over 350 strategic plans for a variety of clients and have cultivated broad experience across all members of our strategy team to successfully conduct virtual and in-person strategic planning sessions, retreats, and stakeholder engagement activities. These activities include surveys, stakeholder interviews, focus groups and facilitated workshops. We utilize effective virtual tools, such as Zoom, Miro (collaborative software for planning sessions), Poll Everywhere, and Survey Monkey, to ensure an interactive and collaborative experience.

Organizations that are the most successful at implementing new strategies and reaping their benefits tend to do two things right: they get early buy-in from key stakeholders and make sure their leaders have the skills and willingness to see new strategies through. We call this approach "integrating people and process for impact."

This requires top leadership to advance on three tracks: developing the strategic plan, building key support for it, and ensuring their organization can execute it. In other words, strategy development, stakeholder development, and leadership development (graphic below).

Running these three processes concurrently is critical, as they inform each other. Approaching them in phases or neglecting any one of them is like trying to fly a plane with one wing. Leaders willing to tackle all three processes simultaneously are more likely to achieve their plan's desired outcomes.

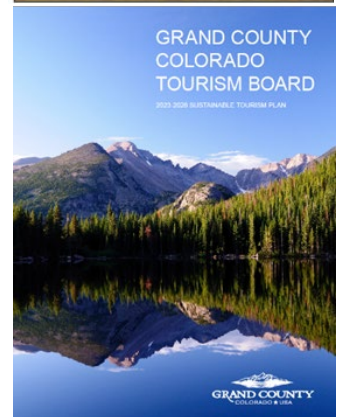
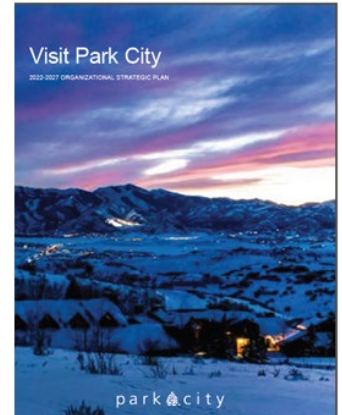


To read more about how we think about strategy development, visit: www.coraggiogroup.com/whitepaper-library to download our whitepaper.

Strategic Planning Experience

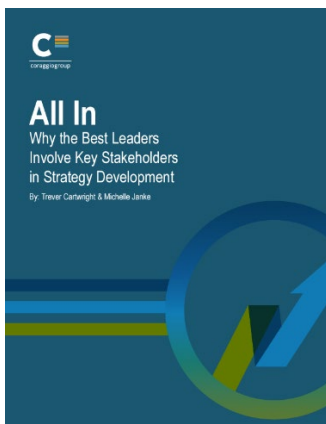
Strategic planning is the core of our work at Coraggio, making up two-thirds of the projects we facilitate. We partner with various clients, from non-profit organizations to public and private clients. Over time, we have learned a few things about what makes a strategic planning process successful and what makes the resulting plan work for an organization and its people. Some of these are particularly important for MCTC's planning process.

- 1. We believe every destination organization is capable of excellence and that the path to that excellence is through a parallel focus on smart strategies for your organization and active development of your people.** Focusing only on the process will leave you with a depleted team that isn't ready to implement the decisions they have made. On the other hand, focusing only on the people won't help you develop the rigorous plan you need. We work hard to bring both the people and process into all aspects of the engagement.
- 2. You have valuable insight.** While we bring a depth of experience working with rural and urban destinations nationwide, we will want to tap into your knowledge and understanding of local dynamics and destination opportunities and challenges from project start to finish. In this way, we view ourselves as your partner in creating your next strategic plan.
- 3. Engagement of your stakeholders is critical for building momentum and buy-in for implementation.** That engagement must be genuine, meaning that participants need to feel they have a real opportunity to influence the strategic decisions made during the plan's development. We believe our approach to stakeholder engagement sets the stage for shared enthusiasm and ownership of strategic plans once they are complete and ready to be implemented.
- 4. Implementation needs to be rooted in agility.** Turning a strategic plan into results means identifying specific actions, assigning ownership of those actions, and determining timing and phasing. It also means preparing to change course if market conditions change or if there are unforeseen impacts on your operating environment, such as global pandemics or national incidents impacting travel.



Robust Stakeholder Engagement

Our method of stakeholder engagement is designed to deliver a final plan that is genuinely stakeholder-informed, with a strong sense of plan ownership throughout the community. This is why we recommend a layered approach that includes targeted online surveys and qualitative 1:1 influencer interviews, allowing us to take a deeper dive into opportunities and challenges that surfaced in the survey.



This broad outreach ensures ample opportunity to hear from as many voices as possible and to incorporate diverse perspectives as we build the plan. Taking the temperature with key external stakeholders will be important in discovering and addressing community issues and trends that will impact the decision-making process and inform priority setting.

Project Team



Trever Cartwright Founding Partner and Strategic Advisor

Trever helps destination leaders and their organizations get clear, get focused and get moving on their most important strategic and organizational challenges. He has worked as a destination strategist for state tourism offices and CVBs at every scale, both urban and rural, nationwide.

B.S., Journalism,
University of Oregon

Certified in PROSCI®
Change Management

Colorado Leadership
Journey Mentor

Global Sustainability
Tourism Council Trained
Practitioner

Trever's background includes nearly 10 years as co-owner of a Sacramento-based advertising agency, where his work was recognized nationally by Adweek, Newsweek and Success magazines. He is a published author, a Forbes.com contributor and has been a guest speaker at Harvard and Stanford Law schools, the University of Oregon, Portland State University, numerous Governor's Conferences on Tourism, and several professional associations nationwide, including Travel South, Destinations International, U.S. Travel Association's National Council of State Tourism Directors Leadership Forum, and the Western States Tourism Policy Council's annual WESTO conference.

Select Projects and Experience

Trever has worked with the following destinations:

- Visit California
Initiative Strategy and Communications, Industry Engagement
- Santa Monica Travel & Tourism
Strategic Planning
- West Hollywood Travel + Tourism Board
Strategic Planning, Stakeholder Engagement
- Los Angeles Tourism and Convention Board
Strategic Planning, Stakeholder Engagement
- Beverly Hills Conference & Visitors Bureau
Strategic Planning
- Travel Portland
Strategic Planning, Stakeholder Engagement
- Visit Carlsbad
Strategic Planning, Stakeholder Engagement
- Wyoming Office of Tourism
Strategic Planning, Industry Engagement
- South Dakota Department of Tourism
Strategic Planning, Industry Engagement
- Travel Oregon
Visioning, Strategic Planning, Stakeholder Engagement
- U.S. Travel/National Council of State Tourism Directors
Leadership Development, Workforce Development Initiative



Jen Gray-O'Connor

Associate Principal and Project Lead

Jen brings over 15 years of stakeholder engagement and project management experience to her work at Coraggio. As a community engagement specialist and trained facilitator, Jen has developed equity-centered engagement strategies that respond to the needs of diverse stakeholder groups. She has worked extensively with clients to develop strategic communications that are sensitive and respectful of their goals and objectives.

Before joining Coraggio, Jen spent 20 years researching structural inequalities and working to elevate community input in public decision-making. She began her work in community engagement for the City of Riverside, CA where she developed participatory governance opportunities for residents across the Inland Empire. She is committed to social justice and change, as demonstrated through her time as a critical race theory and urban sociology lecturer at the University of California, Santa Cruz, and as a research consultant with the Insight Center for Workforce Development in Oakland, CA, where she explored the racial wealth gap.

B.A., Communication Studies, University of Kansas

M.P.A., Public Policy, University of Kansas

M.A., Sociology, University of CA, Santa Cruz

Ph.D., Urban Sociology, University of CA, Santa Cruz (in progress)

Global Sustainable Tourism Council Trained Practitioner

Select Relevant Experience

- Louisiana Office of Tourism *Strategic Planning*
- Sonoma County Tourism Office *Tourism Resiliency Planning*
- Monterey County CVB *Strategic Planning, Stewardship*
- Visit Morro Bay *Strategic Planning*
- Visit Carlsbad *Strategic Planning*
- Visit Detroit *Strategic Planning, Leadership Training*
- City of Pinetop-Lakeside *Community Engagement*
- Montana Department of Commerce *Tourism Resiliency Planning*
- Brand USA *Strategic Planning*
- Iowa Tourism Office *Strategic Planning*
- Missouri Division of Tourism *Organizational Assessment*
- WorkSource Oregon *Continuous Improvement Planning*
- Portland State University *Strategic Planning*
- Oregon Department of Transportation *Commerce and Compliance Communications, Community Engagement*
- City of Portland *Facilitation, Community Engagement*
- City of Lake Oswego *Community Engagement*



Sam Brigham

Senior Research Analyst

B.A., Economics, Yale University

Global Sustainable Tourism Council Trained Practitioner

Sam is a Senior Research Analyst at Coraggio Group, where he provides analysis that helps clients understand the current state of their organization and decide where to head next. Skilled in researching and analyzing large datasets to distill their complexities into the insights most relevant to a given organization, Sam helps clients block out the noise to articulate and prioritize their most important challenges and opportunities. A creative problem-solver, Sam is always on the lookout for different ways to use data to help our clients get clear. Sam also possesses strong writing skills that complement his analytical mindset and help him tell the complete story of an organization’s status quo.

Prior to joining Coraggio, Sam worked in an internal consulting and process improvement role for a customer-experience-as-a-service company. As an undergraduate, Sam supplemented his economics studies with courses in environmental studies and statistics, a background that helps him view our clients’ challenges and opportunities through a variety of lenses, from the human to the economic to the environmental. Outside of Coraggio, Sam enjoys reading nonfiction, keeping up with current events, running and traveling.

Select Relevant Experience

- Arizona Office of Tourism
Rural Cohort Community Strategic Planning
- Arkansas Tourism
Strategic Plan
- City of Goleta
Visitor Profile Analysis & Economic Development Strategic Plan
- Los Angeles Sports and Entertainment Commission
Strategic Plan
- Multnomah County District Attorney’s Office
Weighted Case Analysis
- Montana Department of Commerce
Tourism Resiliency Planning
- Sonoma County
Destination Stewardship and Resilience Plan



Brad Simmons

Art Director

B.A., Graphic Design, Art Institute of Dallas

Brad has a passion for visual communication and partners with our project teams to design and transform reports, presentations, and print materials into visually appealing documents that connect with our clients’ goals and brand. Brad is a creative art and design professional with expertise in branding, digital, print, and packaging. He’s enthusiastic about fine art and experimentation as well—with a desire to create new ways for these ideas to coexist and function together, all while delivering a clear and compelling message.

Scope of Work

Per RFP: Proposal of MCTC strategic plan and methodology.

We propose our straightforward, three-phase framework to Get Clear, Get Focused, and Get Moving on Visit Mendocino’s Strategic Plan. We have identified the general components of our approach, including deliverables for each stage, as detailed below.



Phase One: Get Clear

The Get Clear phase represents the foundation for the project and sets the stage for early wins and ongoing success from start to finish. We will work with you to create and maintain the conditions necessary for an open, transparent, and fun strategic planning process—one that serves as a galvanizing mechanism for further unifying your stakeholders and consistently reflects the organization’s values.

Kickoff Meeting

To start from a solid foundation, we will meet with you and perhaps one or two key Board members in a 90-minute virtual work session to understand the big picture from your perspective and clearly define what success looks like for this project. We will also want to get clear on the range of stakeholders who need to be engaged to make this work a success, and we will work with you to begin to define the makeup of your Strategic Planning Team. We will come prepared with an outline, educated questions, and a recommended approach for the project plan and stakeholder engagement approach.

Stakeholder Engagement

We believe a wealth of wisdom and good ideas come from within an organization and its external stakeholders. Therefore, most of our projects include a series of organized interviews, focus groups, and surveys. We tailor our approach to meet the specific needs of the organization. Based on our experience working with you in the past, we recommend the following:

- Eight one-on-one phone interviews with a mix of Board members and staff
- An online survey of stakeholders—Board members, tourism industry partners, community members, and other partner organizations—to help us build a broad understanding of the opportunities and challenges facing the visitor economy in Mendocino County

We will use what we learn in the kickoff meeting to develop an organized approach with targeted questions that draw out the needed information while demonstrating to participants that this process is being accomplished *with* them, not done *to* them. Our questions will be both strategic and tactical. We will want to understand how they

envision the future of tourism in Mendocino County and how Visit Mendocino County can make progress toward that future.

Insight Report

We will work to create a report that summarizes the various themes and insights from the immersion, research, and engagement efforts. We will support each theme with data and anonymous quotes from our interviews. The report will provide us with decision criteria for filtering the strategic decisions made during the planning process. In other words, we will have a way to ask the question, “How does this decision support or align with the insights we gathered in our engagement activities?”

The insight report will be similar to the last insight report we provided for Visit Mendocino, with an example below.



Phase Two: Get Focused

The Get Focused phase is where we will roll up our sleeves and get to the work at hand: building the strategic plan for Visit Mendocino County, one that builds upon the excellent momentum you've created through the implementation of your current plan. Your next Strategic Plan will affirm and amplify your vision for your destination and chart a clear path for making progress toward it over the next three years. Please note that we understand that this process may entail a thorough review of your current mission and possibly refinement.

We propose following our flexible Strategic Planning Framework outlined below:



We propose drafting these elements in four focused, interactive, lively workshops facilitated by our destination strategy team. We suggest that these workshops be held in a once-a-week cadence via Zoom or similar videoconference technology. Should the opportunity to hold face-to-face meetings arise, we recommend scheduling two pairs of sessions on back-to-back days, approximately two weeks apart, to save on travel costs.

Strategic Planning Work Session One: Insight Report and Strategic Clarity

Strategic planning, while critically important, can sometimes feel like a chore. With Coraggio, you can count on us to make it fun and engaging. We leverage interactive exercises, virtual engagement platforms, and effective approaches to keep your strategic planning team excited about the process and passionate about the work ahead.

In the first work session, we will begin by sharing our Insight Report, detailing what we learned through the interviews and survey. We will then spend the rest of the work session focusing on the part of the plan we call Strategic Clarity. This is the high-level view of your strategy and includes the following elements:

- **Vision** - What is the ideal future state we are trying to create for our destination?
- **Mission** - What is our purpose as an organization? What are we here to make happen?
- **Values** - What fundamental beliefs shape how we work together and serve our mission?
- **Reputation** - What do we want to be known for as a destination?
- **Position** – What unique value does Mendocino County offer target visitors? How do we stand out compared to our competitive set of destinations?

Recognizing that you have these fundamentals in place from your past strategic planning process we facilitated, we see the work in this first session as revisiting the existing elements of your Strategic Clarity to see if they still serve your organization and destination as currently written, revising them if needed.

Strategic Planning Work Sessions Two and Three: Strategic Focus and Action

In the second and third sessions, we will work with the team to define your Strategic Imperatives and to define the remainder of the Focus and Action parts of the plan, including the following elements:

- **Strategic Imperatives:** What must be accomplished over the planning horizon?
- **Objectives:** How will we measure success?
- **Initiatives:** What collective, transformative actions must we take to achieve our Imperatives?

Phase Three: Get Moving

In the Get Moving phase, we will assist you in putting the final touches to your strategic plan.

Strategic Planning Work Session Four: Plan Finalization

In the final session, which will be a single half-day, we will work with your team to revisit and finalize all the elements of your Strategic Plan and prepare to communicate the plan to your Board and stakeholder community. We will use this session to polish the language in the plan and check the new plan against the Insight Report to ensure it addresses the needs of your stakeholders. We recommend inviting the full Board to participate at the end of this meeting. The planning team will walk the Board through the draft plan and let them ask questions and provide feedback.

Strategic Plan Documentation

Once we complete the workshops and have feedback from the Board, we will take some time to collect everything the strategic planning team decided into one coherent document. We have a one-page Strategic Plan format that has proven very effective at helping both planning participants and non-participants understand the overview of the strategic plan while also being able to reference the specifics quickly. In this way, the final document acts as both a guide to working the plan and a tool for communicating it.

Below are examples of one-page strategic plan documents we've completed.

San Luis Obispo TBD Strategic Direction 2020–2025

| VISION | MISSION | VALUES | REPUTATION | POSITION |
|--|--|--|---|--|
| A welcoming community with a vibrant economy that enriches the lives of visitors and residents alike | We share the abundance of SLO, driving the lodging economy and serving as the voice of our stakeholders | <ul style="list-style-type: none"> Service Leadership Adaptability Collaboration | <ul style="list-style-type: none"> Essential Approachable Strategic Timely Effective | The SLO TBD stewards the brand of San Luis Obispo and represents its lodging partners, driving overnight stays by: <ul style="list-style-type: none"> Telling the San Luis Obispo story via targeted marketing content and activities Serving as a convener and subject matter expert for tourism conversations impacting the destination Advancing strategic partnerships that extend the reach and influence of the SLO TBD |
| IMPERATIVES | OBJECTIVES | INITIATIVES | | |
| Elevate the SLO Brand and Experience | <ul style="list-style-type: none"> Increase visitor awareness in target markets Increase positive visitor perception | <ul style="list-style-type: none"> Identify the core SLO identity and develop a plan to market it Establish a TBD social presence Identify opportunities to influence management efforts | | |
| Deliver Smart Growth | <ul style="list-style-type: none"> Grow RevPAR by 4% year-over-year, adjusted for inflation Year-over-year growth in TOI, adjusted for inflation Year-over-year growth in ratio of weekday to weekend occupancy | <ul style="list-style-type: none"> Develop a group sales strategy Develop a mid-week promo Develop a local business tour Influence the SLO conference Develop an approach to more | | |
| Build Meaningful Partnerships | <ul style="list-style-type: none"> Increase year-over-year average Earned Partnership Value score Grow economic impact of tourism in SLO, adjusted for inflation | <ul style="list-style-type: none"> Identify and develop DOD projects Create a partnership strategy for TBD/Mission | | |
| Ensure Organizational Excellence | <ul style="list-style-type: none"> Growth in member newsletter open rates Growth in stakeholder satisfaction score on survey | <ul style="list-style-type: none"> Develop an organizational rebrand Establish and document a process Identify opportunities to streamline | | |

Visit Prescott Strategic Plan

| VISION | MISSION | GUIDING PRINCIPLES |
|---|--|---|
| Prescott is a welcoming and unforgettable year-round destination attracting visitors seeking to experience authentic, Western heritage and unparalleled natural beauty. | We attract visitors to Prescott and enhance our community's quality of life by inspiring a love and respect for our natural beauty, rich history, and hometown atmosphere. | Our work to promote the destination and support the growth of our tourism industry must: <ol style="list-style-type: none"> Engage residents and industry stakeholders Enhance, enrich, and simplify the visitor experience Emphasize the quality of visitors over the quantity of tourists Consider the impact of our work on existing infrastructure and community resources Support the responsible use of our natural resources and assets Seek to enhance our quality of life and increase economic opportunity Preserve our community's exceptional hospitality and create an environment that is welcoming to all |
| AREA OF FOCUS | SUCCESS MEASURES | INITIATIVES |
| Grow and Build Sales & Marketing Infrastructure | <ul style="list-style-type: none"> Increase in room nights mid-week (occupancy rates) Maintain bed tax revenue Increase in owned/earned media engagement | <ul style="list-style-type: none"> Hire a dedicated Group Sales Manager with specific focus on mid-week and shoulder season opportunities Develop a sales and marketing strategy Continue to support current events through enhanced promotion and fiscal support Establish a data analytics program to target niche attraction markets and visitor segments |
| Improve Visitor Access & Experience | <ul style="list-style-type: none"> Increase in Prescott's destination net promoter score (NPS) Increase in visitor wayfinding, such as info kiosks, attraction maps, and online tools | <ul style="list-style-type: none"> Develop and launch an enhanced wayfinding program with a focus on new historical & educational signs, information kiosks, directional maps, and self-guided tour apps Develop and publish "Prescott Stories" on website and social media Enhance partnerships with the Chamber and POP to seek opportunities to improve visitor access and experience |
| Sustain a Healthy Level of Tourism | <ul style="list-style-type: none"> Increase in the number of new and repeat annual visitors Increase in the number of shoulder season and mid-week visitors Increase in direct and indirect visitor spend | <ul style="list-style-type: none"> Develop a strategic marketing campaign to attract visitors mid-week Establish a shoulder and meeting planner engagement program focused on small trade associations/groups Complete a shoulder season gap analysis and asset mapping study |
| Enhance Community & Stakeholder Engagement | <ul style="list-style-type: none"> Increase in the number of newsletter clicks or open rate Increase in the Office of Tourism partner satisfaction score Increase in the number of attendees at community "team ups" and town halls | <ul style="list-style-type: none"> Hire a dedicated Community Relations Coordinator Establish a tourism attribution, promotion, celebration, and awareness program Develop a Communications Strategy to better share economic impact data and industry developments to decision-makers, the community, and industry stakeholders |

Timeline

Per RFP: Include a process timeline.

The chart below reflects Coraggio's anticipated delivery schedule.

| Phases and Deliverables | | 2023 | | | | | | |
|-------------------------|-----------------|------|-----|-----|-----|-----|-----|-----|
| | | May | Jun | Jul | Aug | Sep | Oct | Nov |
| Get Clear | Kickoff Meeting | | | | | | | |
| | Interviews (8) | | | | | | | |
| | Survey | | | | | | | |
| | Insight Report | | | | | | | |
| Get Focused | Sessions 1-3 | | | | | | | |
| Get Moving | Session 4 | | | | | | | |
| | Documentation | | | | | | | |

Investment

Below is an overview of our fees associated with each phase of work.

| Tasks and Deliverables | | Subtotal |
|------------------------|---|-----------------|
| Get Clear | Kickoff Meeting | \$13,052 |
| | Stakeholder Engagement | |
| | Insight Report | |
| Get Focused | Strategic Planning Session One: Review Insight Report and Strategic Clarity | \$13,728 |
| | Strategic Planning Session Two: Strategic Focus | |
| | Strategic Planning Session Three: Action Planning | |
| Get Moving | Strategic Planning Session Four: Plan Finalization | \$5,335 |
| | Plan Documentation | |
| Total: | | \$32,115 |

Administrative Fees

This budget includes a 4% administrative fee to cover scheduling, print production, administration and other expenses.

Terms

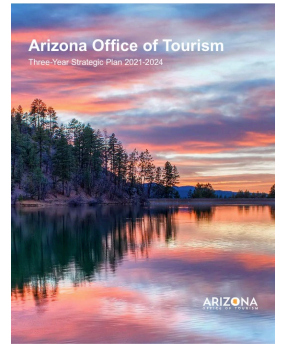
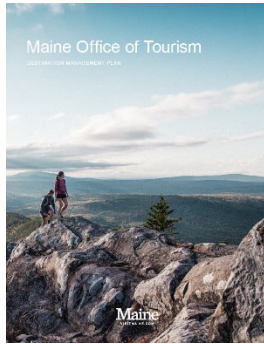
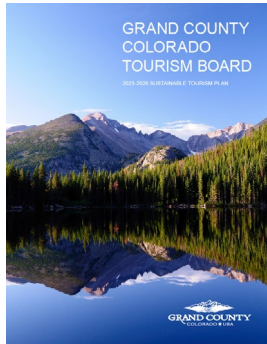
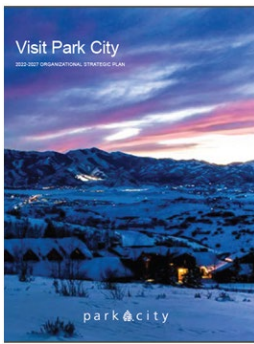
All activities are invoiced monthly and are due net 30. Should any work sessions be scheduled in person in Mendocino County, we will invoice travel amounts at cost, additive to the consulting budget.

Examples of Our Branded Strategic Plans

Per RFP: Present a successful/implemented plan your agency created, executed, the goals & objectives and its results.

The following are examples of our branded strategic plan documents:

Click on any of these cover images to view the full copy of our deliverable.



Sample pages of Visit Park City's 2022-2027 Organizational Strategic Plan



Visit Park City is an example of a recent Strategic Plan we helped create, execute, and successfully implement. As a result, we were awarded an additional contract by Visit Park City for a Stewardship Planning project and its full documentation.



Thank you for considering our firm.

We look forward to helping you
take your next big leap forward.